



UTAH IMAGE STUDY

Presented by Denise Miller
Vice President
Strategic Marketing & Research, Inc.



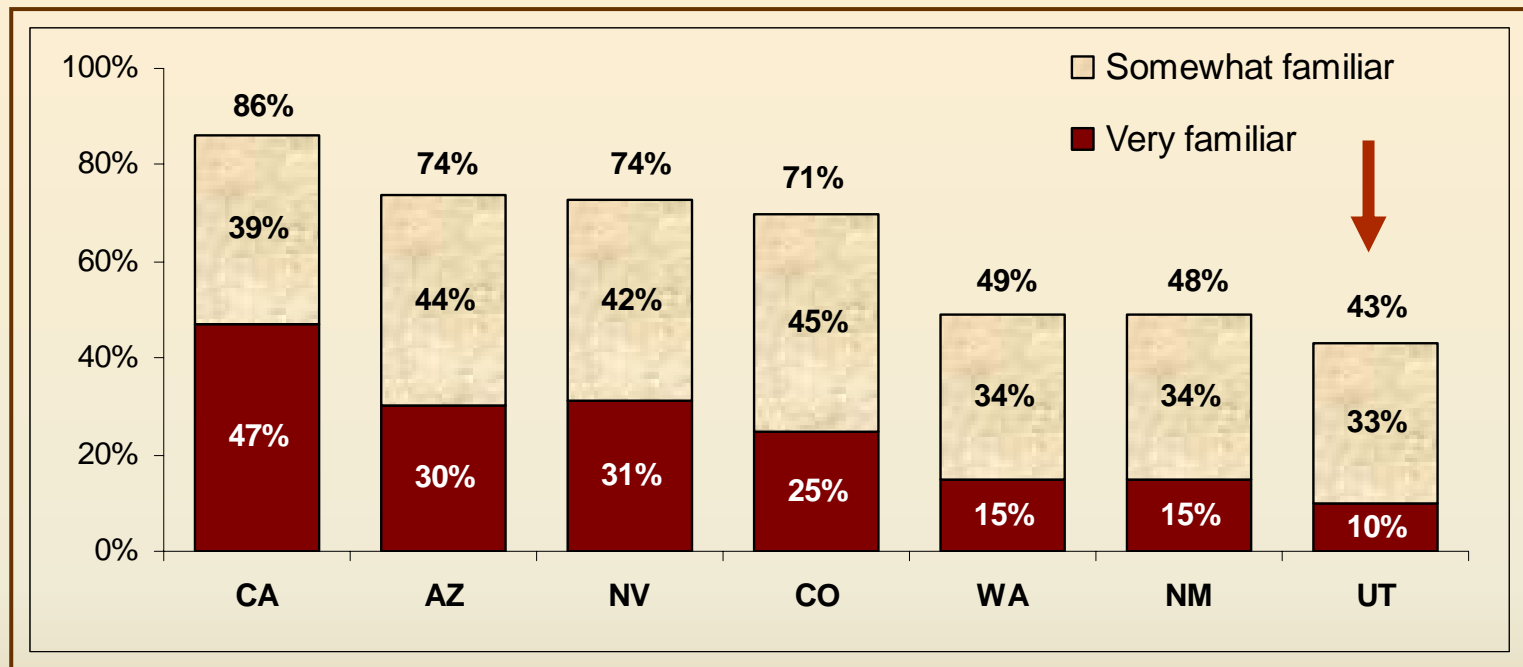
METHODOLOGY

- **On-line survey among 2632 travelers nationally using representative national sample**
- **Accuracy of +/-1.9% at 95% confidence level**
- **Focused on specific type of trips**
 - Involved at least one overnight stay
 - Was not for business
 - Was not exclusively to visit a friend or relative
 - Involved air travel to reach destination in all regions except Pacific & Mountain

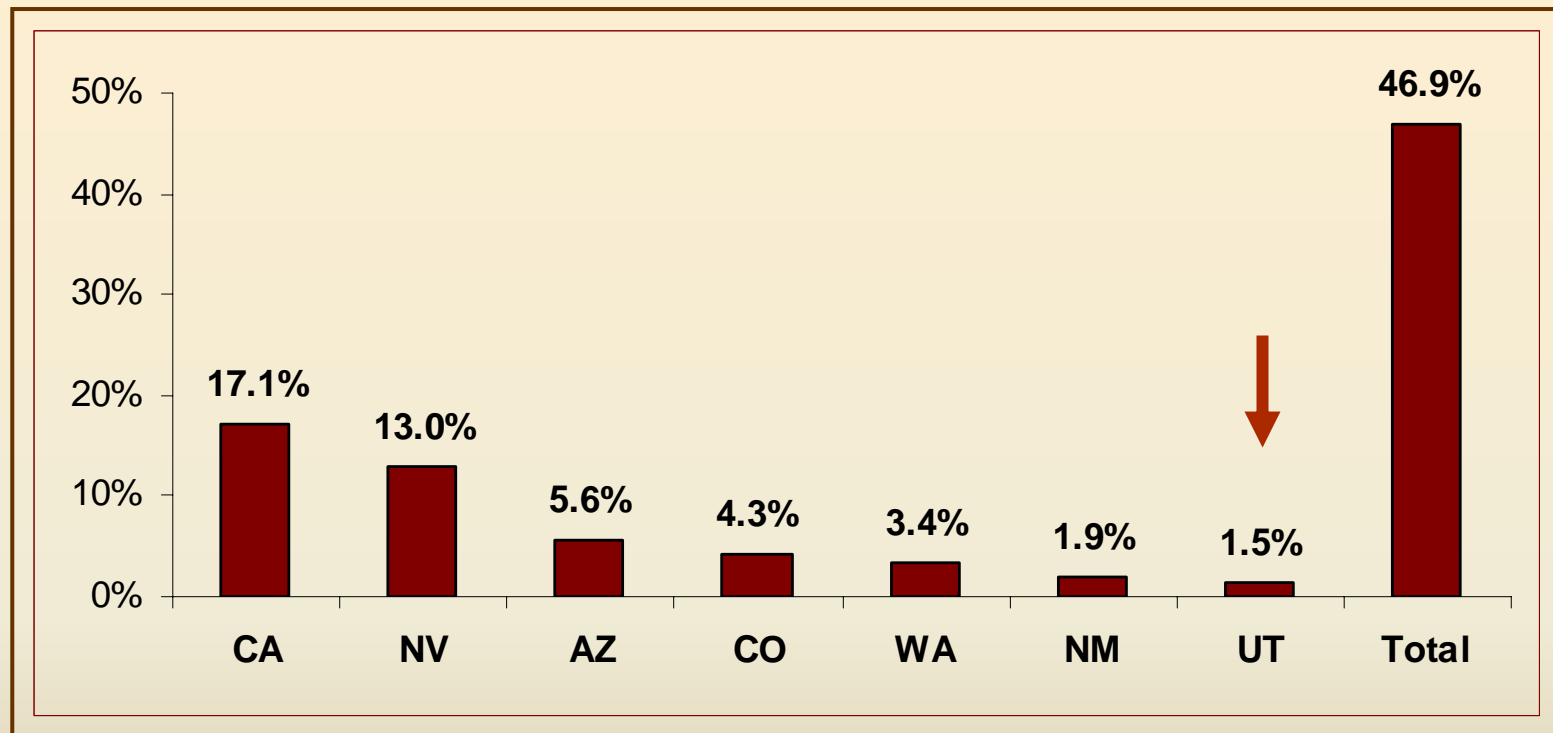


OVERALL IMAGE & COMPETITIVE POSITION

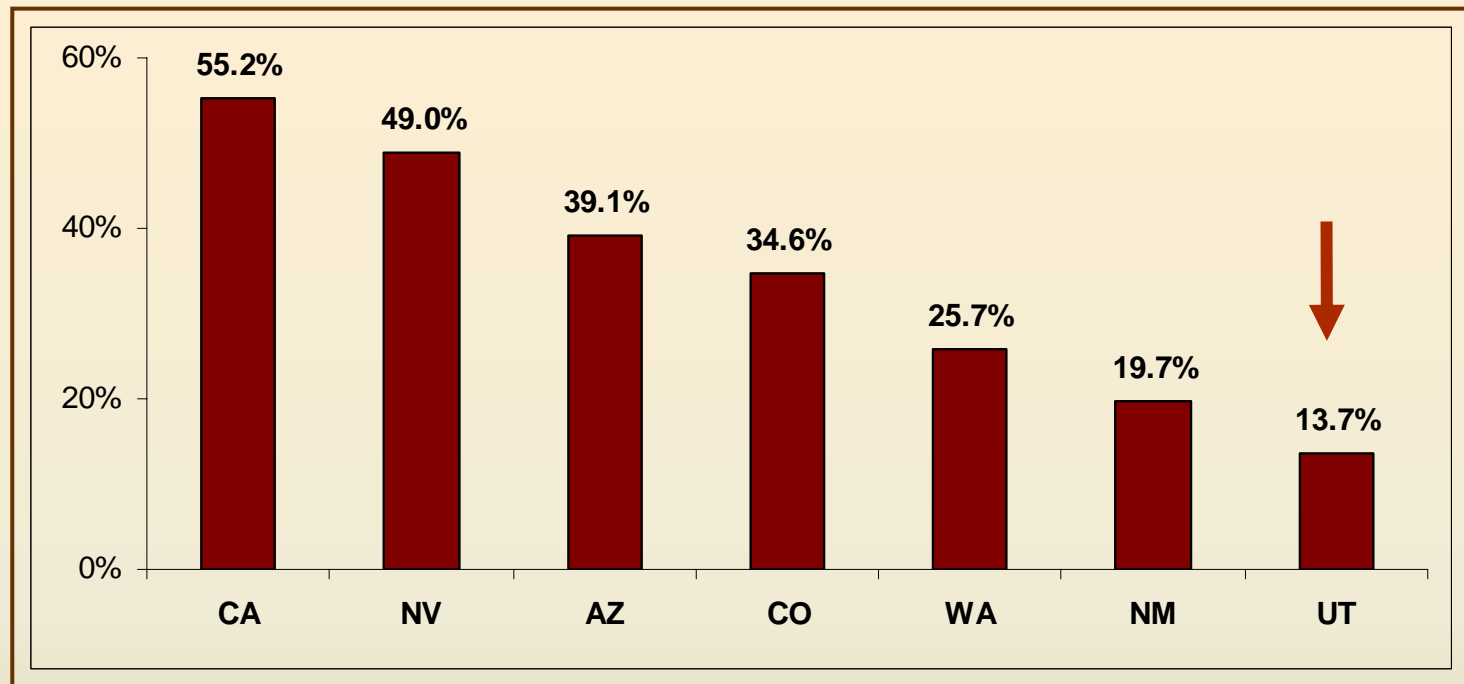
FAMILIARITY WITH COMPETITIVE STATES



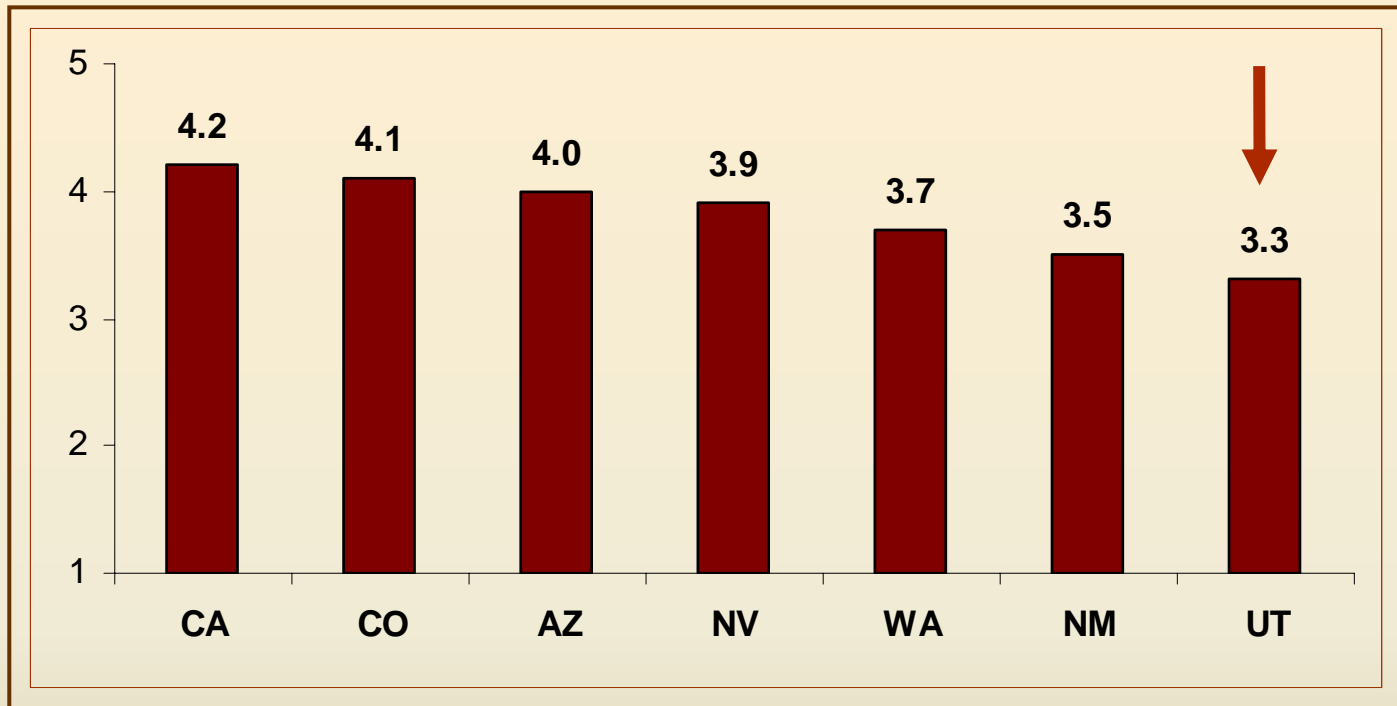
PERCENTAGE OF RECENT QUALIFIED TRIPS



LIKELIHOOD TO VISIT IN NEXT TWO YEARS (RATED 4 OR 5)



RATINGS OF COMPETITIVE STATES





The Fluted Wall, Capitol Reef National Park

DETAILED IMAGE ASSESSMENTS

ATTRIBUTE RATINGS - UTAH

Attribute	Rating	Index
<i>Excellent Ratings</i>		
Dramatic landscapes / mountains	4.06	101
Beautiful scenery	4.05	100
<i>Strong Ratings</i>		
Good place for outdoor adventure	3.83	100
Lots of national parks	3.69	101
Good Snow skiing	3.67	118
<i>Acceptable Ratings</i>		
Relaxing	3.42	98
Friendly	3.39	99
Has variety of historic sites/landmarks	3.38	96
Has activities for all seasons	3.28	92
Good hunting or fishing	3.17	101
Good value for the money	3.12	101
Has wide variety of things to do	3.10	86
Fun	3.10	86

ATTRIBUTE RATINGS

<i>Poor Ratings</i>	Rating	Index
Charming	2.99	94
Elevating	2.97	94
Challenging	2.93	92
Sporting events & activities	2.92	90
Has variety of cultural arts	2.85	86
Exciting	2.84	83
Surprising	2.80	87
Lots of activities for kids	2.75	90
Lots of festivals / special events	2.71	82
Has lots of shopping	2.56	77
Luxurious	2.43	77
Entertainment / nightlife	2.24	69
Hip	2.19	71
Has a party atmosphere	1.95	65

IMPACT OF VISITATION

	Visitor	Non-visitor	Difference
Beautiful scenery	4.66	4.04	0.62
Dramatic landscapes & mountains	4.66	4.05	0.61
Good Snow skiing	4.59	3.66	0.93
Good place for outdoor adventure	4.50	3.82	0.68
Lots of national parks	4.28	3.68	0.60
Has activities for all seasons	4.24	3.27	0.97
Has variety of historic sites & landmarks	4.15	3.37	0.78
Friendly	4.13	3.38	0.76
Mormon religion	4.09	4.06	0.03
Relaxing	4.08	3.41	0.67

IMPACT OF VISITATION

	Visitor	Non-visitor	Difference
Fun	3.97	3.09	0.89
A good value for the money	3.97	3.11	0.86
Charming	3.78	2.98	0.81
Exciting	3.76	2.83	0.93
Has a wide variety of things to do	3.73	3.09	0.63
Sporting events & activities	3.69	2.91	0.78
Lots of festivals & special events	3.55	2.70	0.85
Surprising	3.53	2.79	0.74

IMPACT OF VISITATION

	Visitor	Non-visitor	Difference
Elevating	3.49	2.96	0.53
Has variety of cultural arts	3.48	2.84	0.65
Lots of activities for kids	3.47	2.74	0.73
Good hunting or fishing	3.38	3.17	0.21
Challenging	3.23	2.92	0.31
Has a lot of shopping	3.18	2.55	0.63
Luxurious	2.95	2.42	0.53
Hip	2.69	2.18	0.50
Has a party atmosphere	2.46	1.94	0.52
Entertainment & nightlife	2.37	2.24	0.13

UTAH'S IMAGERY

State's Imagery Based On...	Utah
Mormon religion	59.6%
Beautiful scenery	43.8%
Dramatic landscapes	43.3%
A good place for outdoor adventure	34.3%
Snow skiing	27.2%
Has lots of national parks	26.2%

Specifically, the stronger the association between Utah and the Mormon religion the less positive consumers rated the following attributes:

- Hip
- Has a party atmosphere
- Surprising
- Has a wide variety of things to do
- Entertainment / nightlife
- Fun
- Exciting
- Luxurious

IMAGE & IMPACT

- **The association with the Mormon religion has an impact on image, but not as much on travel.**
- **Strong association with Mormon religion has an 8% negative impact on likelihood to visit**
- **Currently not a major issue in attracting tourism**
- **Impact will be important only if it negatively impacts the selected positioning**



COMPETITIVE ANALYSIS

COMPETITIVE ANALYSIS

- **California – generally strong across the board. Seen as more hip, sophisticated – not a good value for the money**
- **Nevada – the party place – image revolves around Las Vegas – not a good place for outdoor scenery or activities**
- **Arizona – relaxing, friendly, beautiful scenery**

COMPETITIVE ANALYSIS

- **Colorado – the place to go for outdoor adventure, more sophisticate image than Utah**
- **Washington – more relaxed outdoor activities with a dash of charm**
- **New Mexico – viewed as more cultural, and a good value for the money**



TRAVEL BEHAVIOR & MOTIVATORS

PLACES VISITED WITHIN UTAH

Destinations	% Of Trips
Salt Lake City	27.6%
Utah – Misc.	26.3%
Park City	13.2%
Moab	9.2%
St. George	6.6%
Brianhead	5.3%
Logan	3.9%
Lake Powell	3.9%
Zion	3.9%

Month	Utah	Other States
January	12.8%	6.8%
February	11.5%	8.6%
March	9.0%	7.3%
April	9.0%	7.7%
May	10.3%	8.4%
June	6.4%	8.9%
July	6.4%	10.4%
August	9.0%	9.4%
September	6.4%	9.0%
October	6.4%	8.8%
November	7.7%	7.5%
December	5.1%	7.1%

*Other states are those in competitive set

TRIP SPECIFICS

Trip Specifics	Utah	Other States
Duration of trip	4.4 Nights	4.8 Nights
# Of adults	2.9	2.5
# Of children	.6	.4
% Of trips with children	27.3%	21%
Average trip expenses	\$1540	\$1787

TRIP SPECIFICS

Reason for Visitation	Utah	Other States
Specific destination	34%	57%
Specific activity	54%	31%
Specific experience	12%	12%

Motivators of Visitation	Utah	Other States
Mandatory	8.6%	24.1%
Gambling	5.6%	22.0%
Sporting events	4.1%	8.6%
Skiing/winter sports	56.6%	11.0%
Performance	10.7%	8.4%
Participation in sports	12.9%	19.9%
Festival	1.5%	6.1%

TRIP SPECIFICS

Utah

Motivators behind Utah Visitation	Utah
Fine dining	54.3%
Shopping	50.2%
Snow skiing	34.2%
Scenic drives through country	30.4%
Visit quaint small towns	20.7%
Visit a state / national park	19.4%
Wildlife viewing	19.4%
Visit historical sites	17.9%
Rural sightseeing	14.6%
Hike / bike	12.0%
Visit bars / nightclubs	10.0%
None	9.8%
Attend performing arts	6.5%
Water sports	6.4%
Visit health retreat / spa	5.7%
Visit museums	5.4%
Watch sporting events	4.9%
Winter sports, e.g., snowmobiling	4.8%
Urban sightseeing or tours	4.5%
Attend a festival / fair	3.7%
Visit art museums / galleries	1.3%
Golf	0.3%

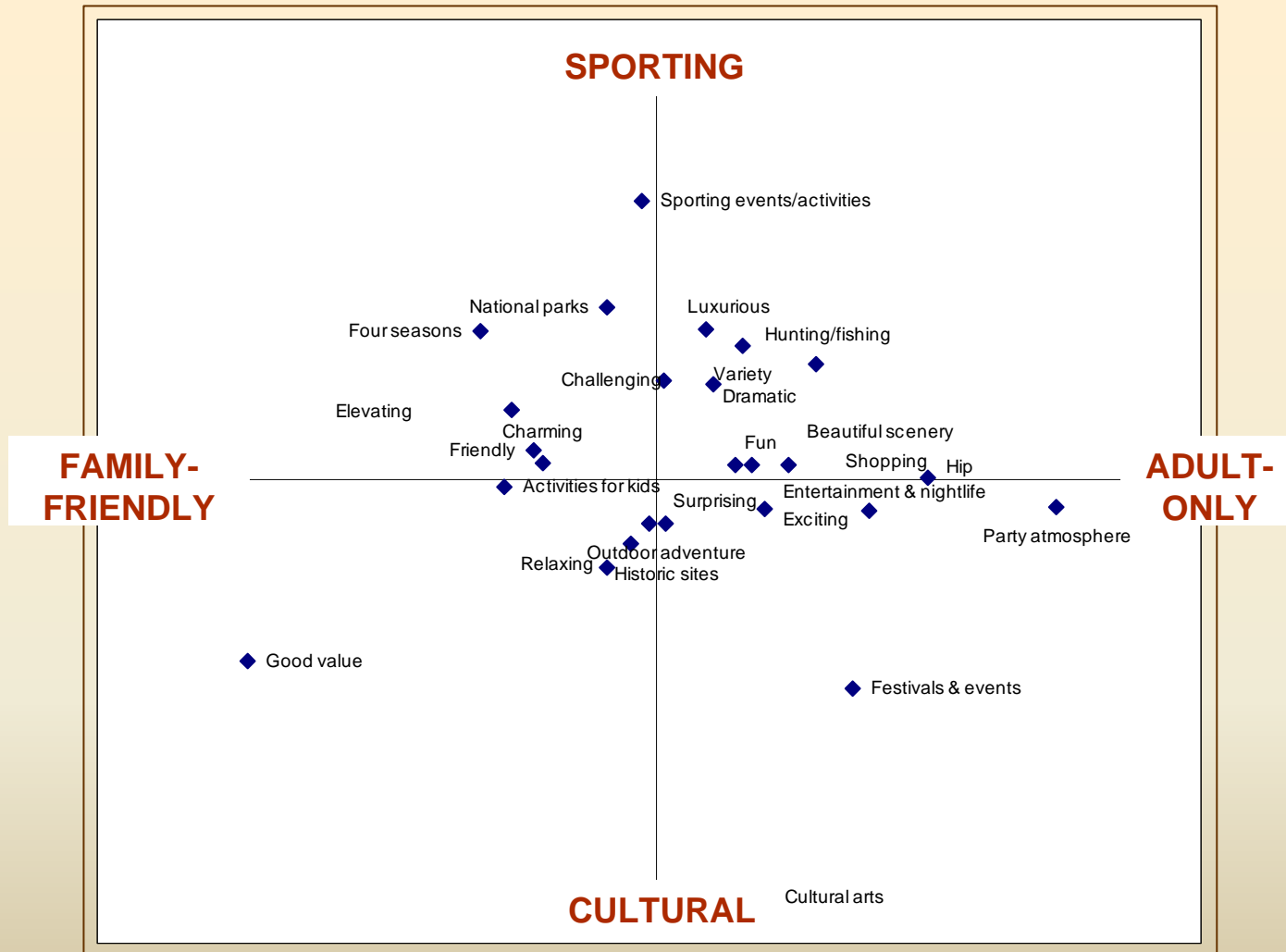
TRIP SPECIFICS

Major Motivational Influencers	% Participate	% Influenced	Motivational Impact
Snow skiing	34.2%	67%	23%
Visit a state / national park	19.4%	42%	8%
Visit bars / nightclubs	10.0%	60%	6%
Shopping	50.2%	12%	6%
Fine dining	54.3%	10%	5%
Visit quaint small towns	20.7%	26%	5%
Watch sporting events	4.9%	91%	4%
Scenic drives through country	30.4%	13%	4%
Hike / bike	12.0%	29%	4%
Water sports	6.4%	55%	3%
Attend performing arts	6.5%	31%	2%
Wildlife viewing	19.4%	5%	1%
Winter sports, e.g., snowmobiling	4.8%	10%	0%
Rural sightseeing	14.6%	3%	0%
Golf	0.3%	100%	0%
Urban sightseeing / tours	4.5%	7%	0%
Visit historical sites	17.9%	2%	0%
Visit a health retreat / spa	5.7%	0%	0%
Visit museums	5.4%	0%	0%
Visit art museums / galleries	1.3%	0%	0%
Attend a festival / fair	3.7%	0%	0%
None	9.8%	0%	0%

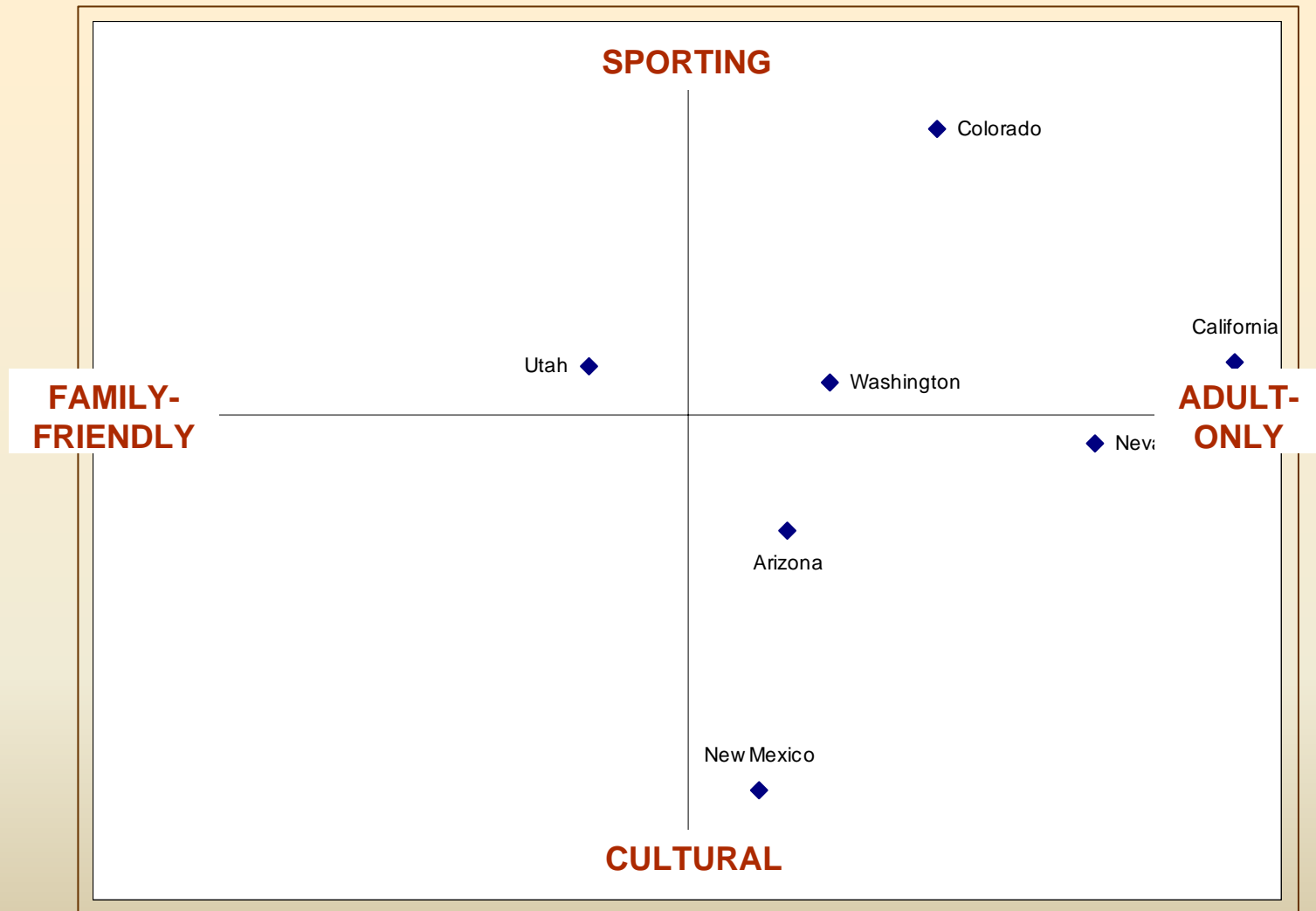


POSITIONING UTAH

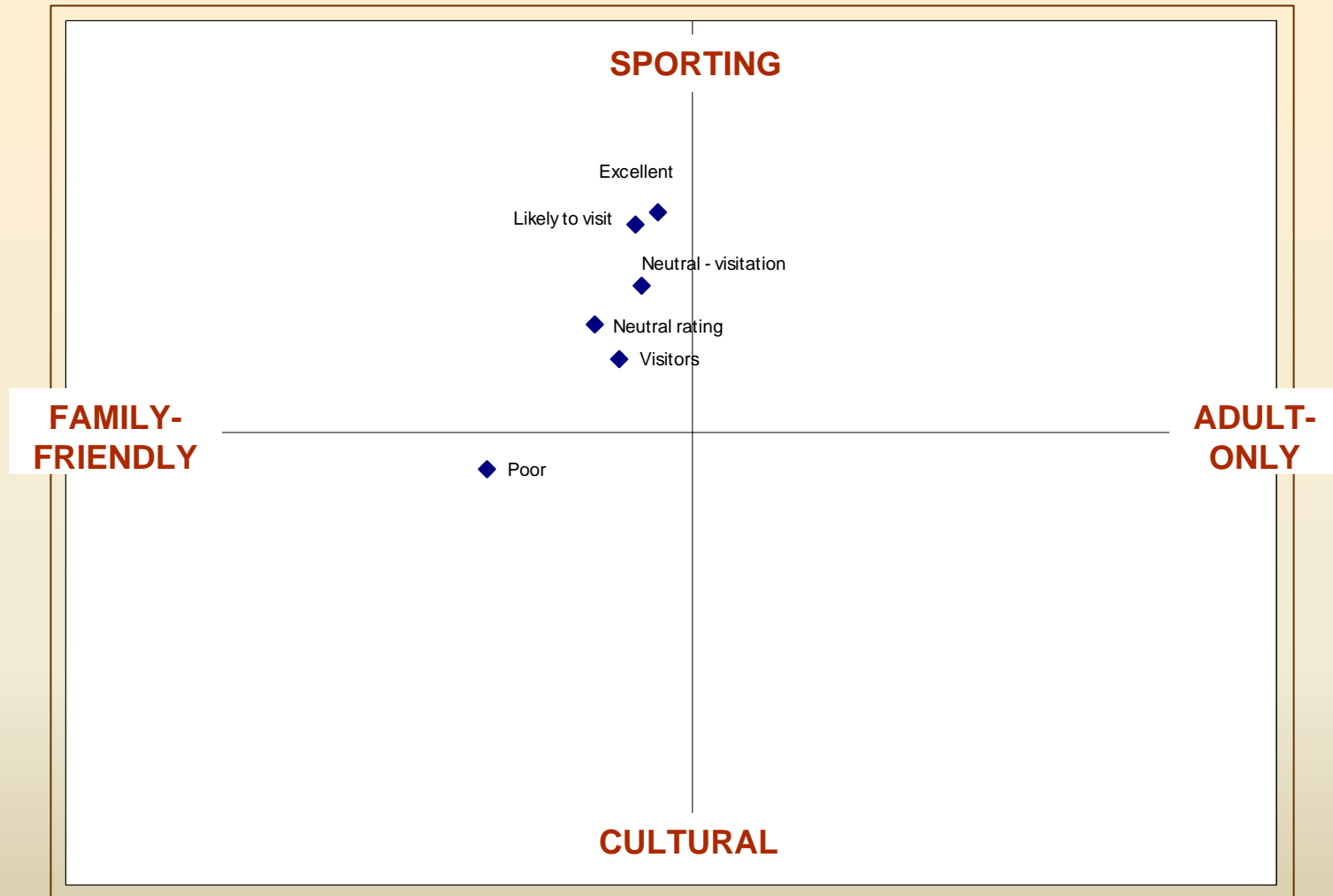
PERCEPTUAL MAP



THE OTHER STATES - PERCEPTUAL MAP



AMONG THOSE MOST LIKELY TO VISIT



ATTRIBUTES TO USE FOR POSITIONING

Attributes for which Utah does fairly well. Its position can be improved by enhancing its image. Reinforce these attributes and improve the ratings slightly.

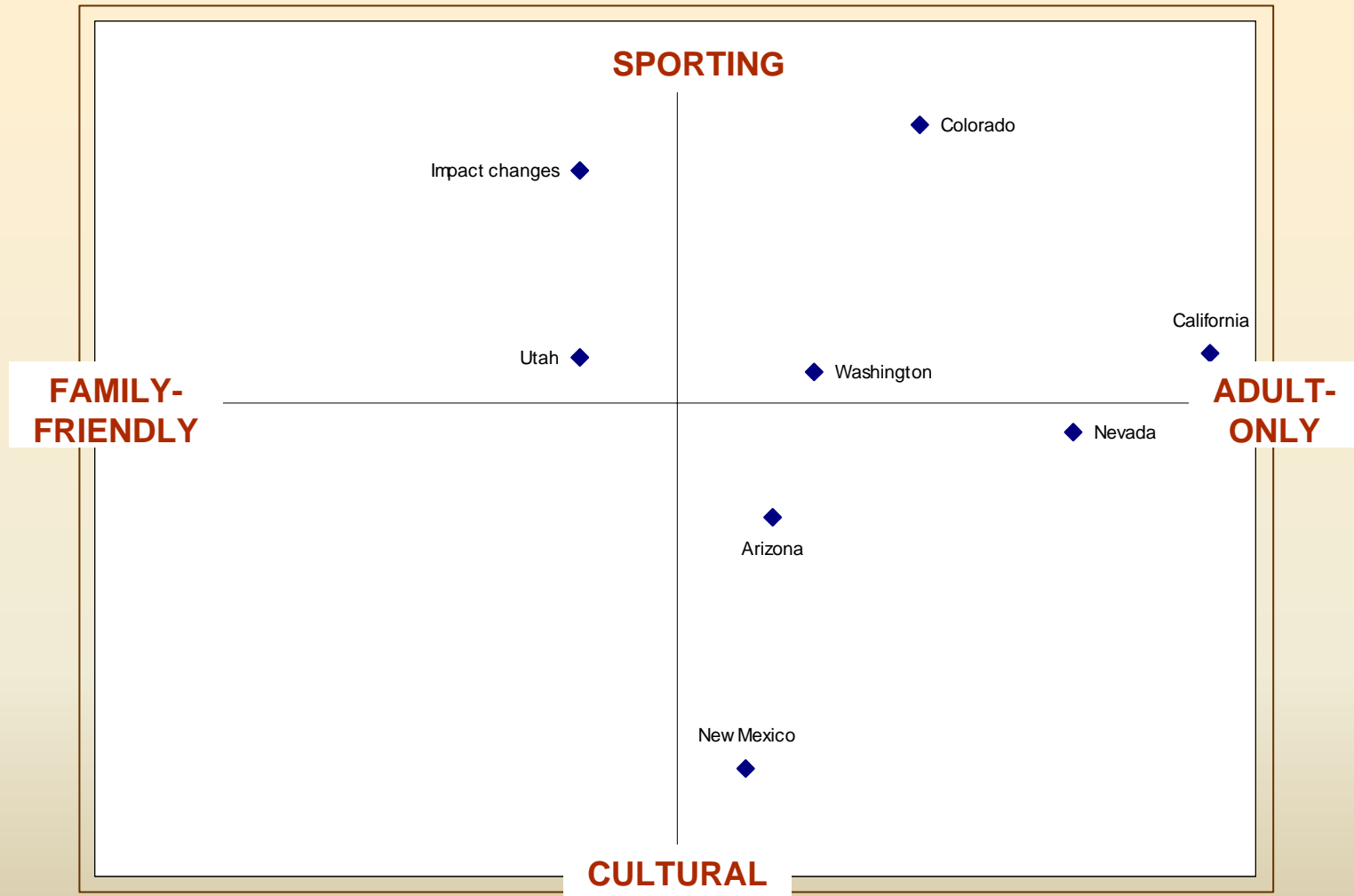
- Beautiful scenery
- Dramatic landscapes
- Lots of national parks
- Good place for outdoor adventure

ATTRIBUTES TO USE FOR POSITIONING

These attributes, for which the state is rated well below average, will improve Utah's image. Improving imagery here will require a more long-term commitment and greater effort. These attributes will help position Utah as appealing, while reinforcing the state's existing strong points. These six attributes are:

- Sporting events & activities
- Challenging
- Elevating
- Lots of activities for kids
- Luxurious
- Surprising

IF RATINGS IMPROVED IN THESE AREAS



THE DECISION PROCESS – BY REGION

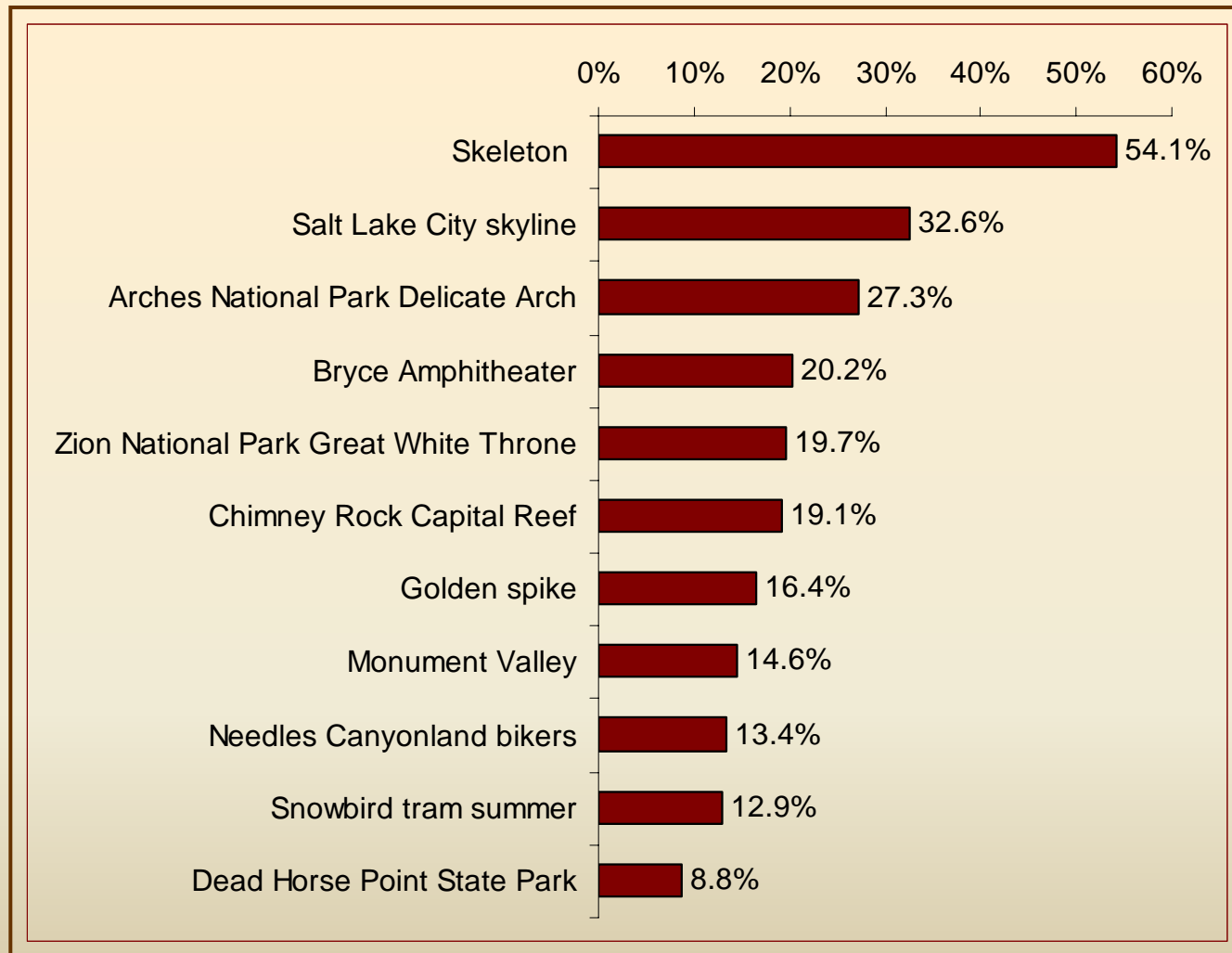
Region	Familiarity	Appeal	Interest	Visitation
Mountain				★
Pacific			★	
West North Central	★			
West South Central	★			
South Atlantic	★			
Middle Atlantic	★			
East South Central	★			
New England	★			
East North Central	★			



The Fluted Wall, Capitol Reef National Park

ADDITIONAL CHALLENGES

ASSOCIATION OF IMAGES WITH UTAH



Skeleton



Zion National Park

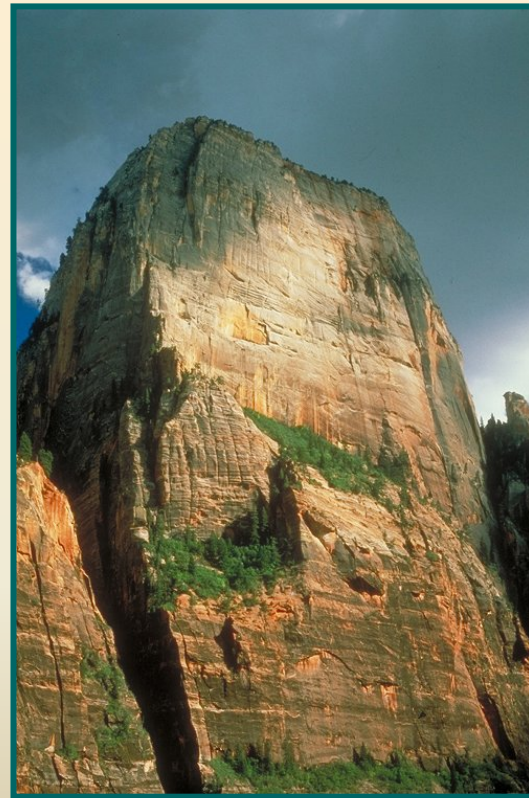


IMAGE ASSOCIATIONS

Images	UT	AZ
Arches National Park Delicate Arch	27.3%	39.2%
Bryce Amphitheater	20.2%	41.0%
Chimney Rock Capital Reef	19.1%	41.0%
Dead Horse Point State Park	8.8%	50.2%
Monument Valley	14.6%	36.1%
Needles Canyonland bikers	13.4%	41.7%

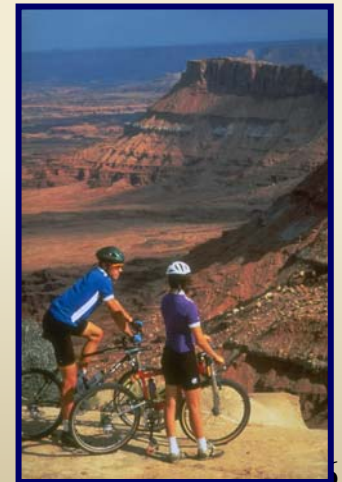
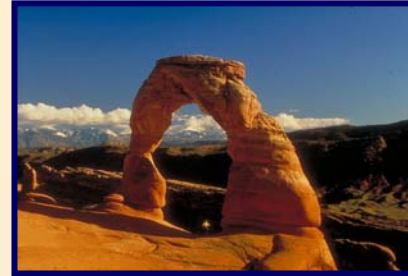


IMAGE ASSOCIATIONS

Three Remaining Pictures

Salt Lake City skyline	32.6%	52.0%	Colorado
Snowbird tram summer	12.9%	46.2%	Colorado
Golden spike	16.4%	23.1%	New Mexico



IMAGE ASSOCIATIONS

VISITORS VS. NON-VISITORS

Images	Non-visitors	Visitors
Arches National Park Delicate Arch	26.7%	71.8%
Bryce Amphitheater	19.7%	52.9%
Chimney Rock Capital Reef	18.4%	69.6%
Dead Horse Point State Park	8.5%	27.7%
Monument Valley	14.2%	40.8%
Needles Canyonland bikers	12.9%	46.9%
Skyline	31.9%	86.0%
Snowbird tram summer	12.6%	32.3%
Golden spike	16.2%	30.6%
Skeleton	53.9%	70.1%
Zion National Park Great White Throne	19.4%	43.1%

CONCLUSIONS

- **Tell the Utah Story**
- **Embrace the Brand**
- **Work Together**
- **Support the Process**